

# THE STRATEGIC ORDER TAKER

Learning and Development.  
Be Seen, Be Heard, Be Valued.



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# About the author

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With 13 years experience in moving learning from being seen as a nice to have a critical component within a business I wanted to share my ideas on how you can go from order taker, to strategic partner.

The journey involves becoming The Strategic Order Taker. I have laid out the book so that you can follow it as a step by step guide or dive into the parts that you need the most.

I hope you enjoy the book and take away something you can use right away.

**Cheers**

Neil

# Contents

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## Introduction

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**Spotting Patterns** **1**

---

**L&D And Finance** **8**

---

**Be More Like Sales** **12**

---

**Ask for Orders** **18**

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**Getting Out Of Your Own Way** **22**

---

**Demonstrating ROI and ROL** **25**

---

**Presenting Your Findings** **29**

---

**Good Luck** **35**

---

**Acknowledgements** **36**

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# Introduction

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## DISPELLING THE MYTH

When I first started working within Learning and Development there was a consensus within the community that the only way to be truly effective, to be taken seriously, to have a seat at the decision-making table was to move from being an order taker to strategic partner.

For a long time I believed this to be true; and I still believe it. Yes we do need to be strategic partners to get a seat at the decision making table, but I also know from a decade of working with teams and individuals that there is a place for order taking and in fact that this is the backbone of becoming a strategic partner.

In a perfect L&D world everyone would get what we do, would understand its value, would naturally reach out to us and ask, "What do you think?" right at the start of every project. This isn't a perfect L&D world and so it's up to us to ask, "How can we get people, teams, and leaders to come to us?". "How do we move the needle from order taker to strategic partner?".

While we are doing this, we should also ask ourselves: "Why do we want to move from order taker to strategic partner?". The answer in my humble opinion is so that we can be seen, be heard and be valued for our contributions.

Over the past decade I have attended workshops, seminars, expo-s and L&D sponsored events where I have been told that the only way to operate is to be at the table, getting my ideas in first and having the rest of the businesses in which I operated to

accept them as the gospel truth. The challenge I've found is that at a lot of these events very few people have any answers about how to move from order taker to strategic partner without buying a hugely expensive solution. So, we all sit watching the sales pitch, knowing we cannot afford it and feeling deflated. We don't have the budget and we won't ever have a seat at the decision making table.

They don't offer simple, practical solutions to address the needs of thousands of L&D professionals, which is to show people how to move from being viewed as an order taker to a strategic partner.

That's the need I've seen and wanted to address with this book.

## HOW DID WE GET HERE?

There is a place for order taking within L&D, most noticeably within sectors that have a lot of requirements for mandatory regulatory training. This type of training is usually transactional for the L&D team because there are few providers of the specific training. It needs to be completed at regular intervals during the year, and when first looked at as a request; it seems there is no need for L&D to think about the provision of this order.

### It works like this:

I need X  
training

+

by X date

=

otherwise I lose my  
accreditation and I can't  
do my job

For a long time this is how learning was viewed; and still is within the majority of organisations, it seems. Learning / training (whatever your preferred term) was a necessity that got in the way of people doing their jobs. They just needed someone to find a provider, book them in and pass on the details.